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# From "Poor" to "Not Poor": Improved Understandings and the Advantage of the Qualitative Approach

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*Re-analysis of qualitative data generated in six Country Poverty Assessments in the Caribbean, suggests that traditional ways of seeing the poor might well lead to unfair categorisation of a people who are unwilling to be seen as living in poverty. Use of qualitative data software was able to bring out new understandings of the conceptual difference between being poor and living in poverty. Wint and Frank suggest that this is a distinction which those responsible for designing and implementing poverty intervention strategies would be wise to bear in mind as it would allow for creative and timely use of community-based strengths.*

**Keywords:** *Poverty, qualitative assessment, qualitative software, Caribbean community, community development, NVivo*

*One morning the Caribbean was cut up  
by seven prime ministers who bought the sea in bolts-  
one thousand miles of aquamarine with lace trimmings,  
one million yards of lime coloured silk,  
one mile of violet, leagues of cerulean satin-  
who sold it at a mark-up to the conglomerates,  
the same conglomerates who had rented the water spouts  
for ninety-nine years in exchange for fifty ships,  
who retailed it in turn to the ministers  
with only one bank account, who then resold it*

*in ads for the Caribbean Economic Community,  
till everyone owned a little piece of the sea  
from which some made saris, some made bandanas  
the rest was offered on trays to white cruise ships  
taller than the post office; then the dogfights  
began in the cabinets as to who had first sold  
the archipelago for this chain store of islands*  
From *The Star Apple Kingdom*, Derek Walcott (1986)

### Introduction

Historically, approaches to poverty measurement have favoured the use of 'objective', quantifiable indicators which should generate internationally comparable indicators. Over the years it has become increasingly accepted by International Financial Institutions (IFIs) and the full spectrum of development agencies, that interventions based solely on these types of quantitative indicators were unable to quickly and innovatively adapt to changing social policies, changing funding directives and changing leadership. The reality is that the experience of poverty is more than per capita incomes and such indicators as quality of housing or distance from nearest school. It is people and communities who experience poverty, who know what it is to struggle against seemingly endless odds making daily life choices between health, schooling, housing, children and family members. Thus, in attempting to address the needs of the poor, policy makers have to be more willing to link the provision of social services to the daily realities and vulnerabilities of those they deem poor, to hear and respect the interpretations of the people themselves.

Appreciating the need for a more thorough understanding of the reality of poverty in the Caribbean, the authors undertook a secondary analysis of qualitative data collected as part of Country Poverty Assessments (CPA) carried out between 1999 and 2004. Use of a qualitative approach appreciated the need for self interpretation, inclusion of all stakeholders and representation of the information in the words of the respondents themselves. The authors therefore attempted to re-analyse the data already collected realising that the original analysis of the CPAs focused mainly on the weaknesses and strengths in the institutional arrangements serving the poor. For us this secondary analysis needed to pay

more attention to such areas as the coping strategies of the poor, their interpretation of who is to blame and their perceived ability to make a change. In this way we would be better able to reflect the views of the respondents particularly in respect of their interpretations of their own strengths and possible solutions which they could be part of.

Qualitative poverty assessments, although contextually bound, have shown the ability to create narratives of diverse realities which cross cultural, political, geographic boundaries giving us the chance to learn from each other. The new analysis of the data would therefore assist in developing ways of alleviating poverty locally and even more importantly, add to the international recognition of people's feelings about what it means to be poor as opposed to living in poverty.

The paper will therefore examine the process of understanding the interpretation of the terms "poor" and "poverty" as afforded from the data generated in the CPAs; it will also examine the residents' articulated wish to move from 'poor to not poor,' reflecting on the strength of the qualitative approach and the usefulness of NVivo software to assist in the process of analysis.

### Context

Between 1998 and 2004, the Caribbean Development Bank carried out Country Poverty Assessments (CPAs) in six countries in the Caribbean viz. Anguilla, British Virgin Islands, the Commonwealth of Dominica, Grenada, St Kitts and Nevis, and Turks and Caicos Islands, all part of what is popularly called the West Indies. These islands fall both within the Windward and Leeward island chains, a feature which leaves them highly vulnerable to a range of natural disasters. They share a common bond of British colonial and plantation experience. As a consequence the countries contributed significantly to the development of a world economy through their exports in bananas, sugar, and spices, until the turn of the twenty-first century when world economies became increasingly fluctuating and unpredictable.

These islands are beautiful and diverse in topography and rely on tourism as a critical contributor to the national economies (on average not less than 25% of total GDP, UNDP 2004 Human Devel-

opment Report). However, despite their similarities (literacy rate, population size, public expenditure on health and education), per capita incomes are significantly higher in Anguilla, British Virgin Islands and Turks and Caicos Islands. In these three countries, economic, political and social infrastructure have developed outside of the plantation experience.

As the following table demonstrates, using a range of poverty indicators, poverty levels are very high. Eleven of fourteen territories report more than 22% of their population below the poverty line while eight of these fourteen report more than 10 percent below the indigence line. In addition there is a high level of inequality which exists between and within countries (all countries in the Caribbean region report a Gini coefficient ratio of 0.4 and over, one of the highest ratios in the world).

As the CPAs showed conclusively, these are predominantly rural populations (from 30%—66% rural populations except Anguilla which is 100% urban), in which there is an undesirable dependence on a market economy (World Bank, 2005) which must respond to changing world tastes and emphases (St Kitts & Nevis, Grenada and Dominica have suffered markedly with increasing unemployment due to market fluctuations in their export economies). Consequently, the contextual differences demonstrated in community-based and individual poverty between the countries appear to make poverty indicators country specific while lending themselves to regional comparison.

If one examines the level of vulnerability of the countries of the Caribbean (World Bank, 2002), it is clear that despite their high levels of economic vulnerability, the Caribbean's social indicators are reasonable when compared to other developing countries. This situation, however, is at risk if the problem of poverty is not confronted directly, as the levels of poverty are still unacceptably high. Also, as a recent study points out (ECLAC, 2002), in addition to the proportions of persons currently living in poverty, there are other households above the poverty line (between 25% and 30%) who are at risk of being poor. Further, in such small developing nations which are vulnerable to both market fluctuations and climate/natural hazards, social policy directives tend to exist in a weak policy environment driven by reactive policies rather

Table 1

*Poverty Indicators for Selected Caribbean Countries*

Country	Poverty Indicators				
	Year CPA conducted	% below Poverty Line	% below Indigence Line	Poverty Gap	FGT P2 (Severity)
Anguilla <sup>o</sup>	2002	23.0	2.0	6.9	3.2
Barbados**	1997	13.9	—	n.a.	n.a.
Belize*	2002	33.5	10.8	11.2	—
British Virgin Islands <sup>o</sup>	2002	22.0	<0.5	4.1	1.7
Dominica <sup>o</sup>	2002	39.0	15.0	10.2	4.8
Grenada <sup>o</sup>	1999	32.1	12.9	15.3	9.9
Guyana***	1999	35.0	19.0	12.4	Na
Jamaica*	2001	16.8	n.a.	n.a.	n.a.
St. Kitts and Nevis					
St. Kitts <sup>o</sup>	2000	30.5	11.0	2.5	0.9
Nevis <sup>o</sup>	2000	32.0	17.0	2.8	1.0
St. Lucia <sup>o</sup>	1996	25.1	7.1	8.6	4.4
St. Vincent and the Grenadines <sup>o</sup>	1996	37.5	25.7	12.6	6.9
Trinidad and Tobago****	1992	21.2	11.2	Na	Na
Turks and Caicos Islands <sup>o</sup>	1999	25.9	3.2	5.7	2.6

n.a. not available

<sup>o</sup> CPAs conducted by CDB; \*\*Barbados, CPA, IDB, 1999; \*\*\*Guyana CPA, UNDP, 2000; \* Jamaica Survey of Living Conditions, Government of Jamaica, 2001; \*\*\*\*Trinidad and Tobago CPA, World Bank, 1999; + 2002 Survey of Living Conditions, Government of Belize.

than well-derived economic and social models of development, with a consequent misfit between the needs of the poor and the provisions for them (Social Protection Study CDB, 2004). As a consequence, poverty interventions have shown peculiar weaknesses in being able to satisfy the needs of the potential recipients in a sustainable and socially acceptable manner (CDB, 2004; World Development Report, 2004).

### What can Qualitative Methods Reveal that Quantitative Cannot?

In order to understand the terms "poor," "poverty," and contribute to a more robust base for policy development, a qualitative approach to data collection and analysis was taken drawing on methods outlined by Patton, 2002, Halmi, 1996, Guba, 1990. The use of qualitative methods of data generation allow the inclusion of such techniques as focus groups, community meetings, small group discussions, community visioning as methods of needs assessment in relation to community resources, strengths and weaknesses. Such methods also allow insight into usefulness/effectiveness of state-run and community-based development organisations. Thus as we continue to improve our techniques used in poverty assessments, the use of qualitative evaluation and needs assessment components cannot be seen as secondary but rather as essential to well-designed poverty assessments providing the opportunity to gather information while simultaneously identifying strengths and weaknesses of the communities.

Having heard "we are not poor" (an interesting finding from the study), the interpretation then becomes complex as there are now new questions to be addressed. What does it mean, to whom does it apply, what is the history underlying this interpretation, answers which are only generated through what House and Howe (2000) term inclusion, dialogue and deliberation. Qualitative approaches give respected voice to the participants, voice unrestricted by the constraints of quantitative *a priori* assumptions, such as poor housing stock, weak sanitation measures and inadequate/sporadic use of educational opportunities. Besides being contextual, the techniques used are non-judgemental, building on the expressions of the respondents and therefore becoming acceptable and understandable (Patton, 2002) by the poor as well as those who are involved in solution implementation.

### Analysis

Data for re-analysis were culled from a total of 221 documents generated from 100 focus groups, 84 individual interviews, 17 community meetings and 16 community scans. Focus groups and

community meetings had from 3–50 participants. Community size was on the average not more than 500 persons. If we look back to the genesis of the project, we will see that data collected in the CPAs were already analysed for the purpose of assisting with the formulation of each country's social and economic policies and programs. Reflecting on the initial purpose therefore, it became clear that there were still outstanding questions which needed to be answered, questions which would benefit from more rigorous analysis if the voices of the independent communities were to be recognised. The use of computer software to assist with analysis was therefore posited as a way to develop this understanding and assist with the development of applicable and relevant poverty reduction strategies.

In discussing the use of software for use with qualitative data, we have moved a long way from "holding the potential" (Bourdon, 2002). Today, software helps us to "handle" (Richards, 2004) our data efficiently, ensuring that having applied the heuristic paradigm in approach and design, the analysis is logical, well constructed and reliably related to the research question. In this instance the researchers were satisfied that proper field procedures had already been applied and application of the Computer Assisted Qualitative Data Analysis Software (CAQDAS) at the analysis stage was appropriate.

We were a team of two, one from the Caribbean, one from Canada. Both coming 'cold' to the secondary analysis meant that considerable time had to be spent on understanding words, the subtle turn of phrase and most importantly the cultural context. Software is a tool to facilitate management of data as well as opening up new ways of thinking. To move to the analysis using NVivo software, therefore meant a first step of team agreement on the meaning of the broad themes already identified.

Our intent in analysis was guided by a critical theorist perspective which sought to identify new ways of change, new understandings of those called 'poor' and most importantly ways of strengthening the expressions of the residents as to solutions. It is important to recall; even though poverty as a concept has been researched extensively over the years, the intent of this analysis was to derive a 'new' personalised understanding of the



experience of poverty, expressed and interpreted by the residents themselves.

The second stage of analysis therefore entailed inductive, data-up coding which allowed emergent themes to reflect logical and empathic relationships being made. The analysis did not use a grounded theory approach as data sources varied widely. Rather the choice was to use thematic coding with constant re-runs to ensure coverage, interpretation and fit. Coding was done by one researcher after the meaning of the theme was agreed on. Continuous communication between the researchers helped with validation and clarity especially in relation to emergent themes. Attributes derived allowed for the use of simple tables, simple frequency counts and searches.

The secondary analysis allowed for an interpretation which residents and readers could identify with, not as the quilt-maker tells a "story" but rather as the "crier," the mouthpiece which tries to get the attention of others. The interpretation of findings therefore involved both appreciating the purpose of the study as well as the immediacy of possible implementation of solutions as suggested by the residents. As Denzin (2003) points out, "in the social sciences there is only interpretation (p. 447)." But the framework derived from that interpretation must develop out of the words of the residents to be used to support their needs. The critical theorist seeks "not just to study and understand society but rather to critique and change society" (Patton, 2002, p. 131). As new concepts emerged from the data, it became the responsibility of the researchers to document this in a manner which would challenge the stereotypical interpretations of poverty, challenge the formal classifications of poverty and bring home the cultural difference of these people. To represent the realities and challenges and solutions posited by the communities and individuals is not a simple task as one needs to ensure a truly non-judgemental use of self, reflexive of the resident's voices. The position of the researcher is therefore both interpretive and advocate.

### From "Poor" to "Not Poor"

Some residents identified their communities as poor with others rejecting the label, comparing themselves to those who

are in a worse situation. To them, to say a community is poor disregards individual and communal efforts over the years. Such indicators as the high level of home ownership, cooperation in the community, being better off now than in the past and being better off than others show that not everyone is "poor." Being poor was often equated with being unemployed and being in a low-paying job due to lack of education; in other words "less fortunate." It was never being lazy, as people are always looking for a way to better themselves and their families. Indigenous families (Commonwealth of Dominica), however, did acknowledge being poor as did those who were disabled, the elderly and in the case of Anguilla and Turks and Caicos islands, the recent immigrants who were earning less than the locals or living in overcrowded conditions.

As one group of residents defined it, they are not poor. But they were able also to explain why they considered themselves not poor and who they considered to be poor. Poverty was defined universally as "the inability to meet basic needs of shelter, food and clothing," and often called "catching hell." However, there is a much stronger negative connotation to the term poverty as it carries with it a sense of exclusion from the larger society. Living in poverty meant more than lack of material needs. It spoke to "mental poverty," or being in a state of anguish. This anguish can be self imposed where the people see themselves as helpless and unable to affect change. Respondents were very judgemental of those who continue to exist in poverty, as they felt that there is always the community, the church, the neighbours and to a certain extent, government institutions which can assist. They also felt it is important to maintain ones' self respect.

This interesting position does not negate the fact that there are many reasons why people became poor, as many have experienced lay-offs due to the significant declines in the sugar and banana industries, which have made a mockery of attempts to sustain livelihoods above the poverty line. There are also the immediate effects of natural disasters; one needs only to look at Grenada which lost 90 percent of its housing and agricultural stock in the recent hurricane of 2004.

To residents, poverty has the greatest effect on the unemployed, the elderly and children of large single-parent families.

Emotional and self-esteem issues are directly associated with poverty. For example, the elderly, left alone as the younger ones migrate in search of economic opportunities overseas, remain at home on low or non-existent pensions frequently feeling a sense of sadness and in some instances hunger as they are unable to tend the fields or prepare their food. Their feelings of self competence diminish and self respect is challenged. For most families which consider themselves poor, poverty is understood to be a cycle of physical and emotional deprivation, with self respect diminishing as such factors as poor educational achievement and shrinking employment opportunities continue to weaken the smallest chances of finding work or even seeking work.

Self esteem was mentioned in 35 documents showing a fairly widespread awareness of this concept. How was it expressed? Feeling ashamed, feeling less and unappreciated, being excluded from mainstream society were some of the ways. Such embarrassments as children not being able to invite guests over due to the state of the house, or children not being properly dressed, all meant having to adjust expectations held of yourself and your behaviours. As embarrassments increased, the adjustment was more often downwards with a consequent lessening of self. In some cases the resolution was to allow a sense of dependence to take over and simply rely on whatever handouts were available. For respondents, one must have a positive sense of self and self competence if you are to take advantage of opportunities when they arise. A dependency mentality, which was seen as a derivative of the plantation experience, was not encouraged.

This understanding of the importance of maintaining a sense of self respect, a sense of self and a sense that one can in fact contribute to mainstream society tends to be underplayed in preference for more objective measures of place of residence, housing conditions and apparent non-acceptance by the larger society. The question was asked, why was poverty being measured? The answer was, so as to find ways to assist with alleviation and facilitating inclusion in mainstream society. However, many called "poor" did not consider themselves poor but because of the classification given to the community or the group, and the use of such categorical measures, they were called poor and deemed to be living in poverty. This is an important finding, as needs assess-

ment is clearly a difficult task, continuously calling on researchers to be innovative and responsive in their approaches. Particularly in addressing poverty, our methods of assessment must include substantive qualitative techniques if respondents are to feel they really are being heard and understood. Through the inclusion of such actions as use of unobtrusive measures and use of techniques which have the ability to add depth, detail and meaning (Patton, 2002), as well as instant validation and clarification, qualitative assessments continue to complement, verify and expand on the traditional indicator approach. The study has shown clearly that 'poverty' and being 'poor' are different concepts and represent different realities. The cultural context is important and definitional.

Coping with poverty emphasised the strength of the collaborative efforts by residents. Residents were able to offer nine descriptions of current coping strategies which accomplished such activities as clean-up operations, building of community centres and homes and generally assisting the poor. Women in particular spoke of this communal effort and forming of groups as their main coping strategy. This could incorporate sharing of food from backyard gardens, sharing of fish when caught and even the contents of 'barrels' that they might receive from overseas relatives. They looked down on depending on boy friends or family as this was seen as continuing dependency. For men, the predominant way of coping was also sharing in the same manner. Men, however, more frequently suggested that stealing or begging might be a way of coping but preferred gambling or hustling as ways of coping. For the youth, mention was made of using candles instead of electricity, borrowing books, waiting until lunch time for a meal from school and patching clothing as measures employed. One cause of concern was the mention made of use of drugs mainly as a source of quick income and sometimes allowing one to forget his/her hardship.

A coping measure frequently mentioned is that of community labour so as to assist less fortunate individuals in time of severe stress. This has been called engaging in a 'maroon.' The concept of marronage (thought to derive from the Spanish word *marrana* or *cimarron* and refers to the politically-independent, free, runaway African slaves) relates to ideas of self-identity. To hold a maroon

would therefore refer to the communal struggle to achieve an end, in this instance the building of a house, a road, a tank/reservoir, etc. In examining this activity it becomes clear that the emphasis is on interdependence and the willingness to have others maintain a respectable level of living. This action to many also reflects the Afrocentric communal regard for others which facilitates behaviours which help in the struggle to maintain a sense of self respect in spite of continued hardships.

### Conclusion

To move from "poor" to "not poor" is a complex task, one in which the mind set of both the person in need and the person assisting with the reduction of that need will reflect daily emotional changes, should reflect a sense of respect for each other and ought to reflect appreciation of the multiple barriers to achievement which exist. One must also realise that those we call poor do not necessarily consider themselves poor, as being poor and therefore living in poverty, connotes feelings of lack of self respect, lack of accomplishment, and inability to critically affect change in their immediate circumstances. Often, being poor encourages dependency on others for provision of material needs.

Living in a state of poverty however, is a state which can be assuaged by the provision of basic needs such as security, housing, food, shelter and access. In the past it has been felt that this is best provided by agencies external to the immediate community of persons. As this study demonstrates, the feeling is clearly that more emphasis must be paid to strength of spirit and ability to help oneself. The solution provided therefore should assist communities and individuals to develop their surroundings and themselves in ways which have been mutually determined, ways which will assist with not only a better quality of life but also inclusion into mainstream society. Residents felt that education and skills training are crucial for success in life. They generally wanted to work but they wanted reasonable wages which could come from formal or informal jobs. In addition, limiting family size was seen as important as there is strong connection between self esteem/motivation and success. Possible solutions

would therefore include increased access to educational and skill training opportunities which will equip them for less fluctuating, money-earning employment, whether formal and/or informal. In realisation of the spoken spirit of community and self-help, this increased access and opportunity must be accompanied by formal support for communal efforts at positively changing their physical and emotional landscape.

As Njeru (2004) points out, part of addressing poverty is the need to recognise that there are variations of diets, security, leisure and recreation, dependent on the diversity of cultures and modes of production as well as the degree of socio-cultural modernity and globalisation. In the Caribbean, the multiplicity of cultures and life styles means that poverty reduction interventions must be tempered by local tastes and well thought out social policy. However, as Derek Walcott reminds us, the islands' similarities are more than their differences and any such analysis although island specific, is able to benefit all of the territories. As an Afrocentric people with strong historical and economic ties to North America and the United Kingdom, these tastes will be fluid, contemporary and strongly associated with a sense of community and sharing.

To move from "poor" to "not poor" calls for interventions which first of all realise the need to hear the voices of the respondents as they struggle to articulate their daily realities. This means adoption of measures which incorporate the qualitative paradigm as part of both data generation and analysis/interpretation. As has been shown, the use of CAQDAS brings a new strength to analysis and allows for in depth interpretation not achieved by the manual analysis. To move from poor to not poor calls also for a willingness to design methods of intervention which accept and build on low income residents' definition of their coping strengths through ways of collaboration and sharing.

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